

GRS Update Proposal

Employee health and medical records (1968)

Proposed Updated Schedule (updates in magenta)

Title

Employee health and medical records (GRS-1968)

Description

These records document an employee's health and medical history as it relates to their employment. They may include doctor's notes, Family Medical Leave Act records, physical or psychological evaluations, or any other records related to an employee's fitness for duty.

Retention and Disposition

Retain for 7 years, and then destroy records.

With consolidation (this schedule into 1968):

Title

Fitness for duty evaluations (GRS-1962)

Description

Records which contain any medical or psychological information used to determine an employee's fitness for duty.

Retention and Disposition

Retain for 5 years, and then destroy records.

Also with separation (this schedule out of 1968):

Title

Health and accident insurance records

Description

These are application forms completed by district employees enrolling into health and accident insurance. The original is sent to the insurer. Includes district name; specific job title; date of employment; policy number; employee name, social security number, address, birthdate, telephone number(s); beneficiary and contingent beneficiary and relationships; information on other insurance and employment; information of coverage requested; optional waiver of group insurance; listing of family members to be covered containing name, sex, birthdates, physicians names and addresses; employee's signature authorizing deductions for insurance; date; effective date and approval signature.

Retention and Disposition

Retain until separation, and then destroy records

Context and Reasoning for Update

This update is intended to resolve duplication in two schedules, provide more specifics about what constitutes Employee health and medical records, and provide a more reasonable retention period for these records. The update is classified as major because of the consolidation and the change in the retention period. Per discussion with HR Manager Rosanne Ricks at the Department of Human Resources Management (10/2/20 - 10/6/20), the major categories of employee health records were identified and a retention period of 7 years was suggested. Consolidating GRS-1962 Fitness for duty evaluations into GRS-1968 Employee health and medical records was originally suggested by Andrea Fiske at Weber Fire District, who also recommended a shorter retention period (7/8/20).

An 1990 consolidation of GRS-1380 Health and accident insurance records into this schedule is also reversed and will be consolidated into a more appropriate schedule.

Current Schedule

Title

Employee health and medical records (GRS-1968)

Description

These records document an employee's fitness for duty. Documentation for health-related leave is included.

Retention and Disposition

Retain for 7 years after separation, and then destroy records.

Feedback

Andrea Fiske
Thu, Oct 15, 9:46 AM
to me

This looks fantastic! Thank you!

Matthew, I have reviewed these with my HR Manager and we both think that these updates are great, and we have no additional input to recommend.

Anthony Adams
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I like the changes as presented. I don't know that one gains much by going from 5 to 7 years on the health and medical records. As far as the training records are concerned, there might be times when an agency may need to show that the training process at the time of the dispute was such that led to the conditions in the employers response to the	No	Bart Miller				bmillar@heberpower.com
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situation. Superseding it might cause some headache down the road for certain agencies.						
I think these are good updates.	No	Chris Shelley		43567367 12		cshelley@sccity.org
The updates look great for both GRS-1968 and GRS-1951	No	Lori Oliver		801-281-1 210		lorioliver@agutah.gov
I agree with changes to both schedules.	No	Jalayne Hatch				jalayne.hatch@loganutah.org
I am in agreement with what is being proposed	No	Veronica Ramos				vramos@pcschoools.us

Sounds Reasonable, no objections	No	Clint LeSueur		80159269 22		clesueur@utah.gov
I'm comfortable with both changes, and am particularly happy that the employee health and medical retention schedule would only be 7 years. We are also comfortable with the updates to the mandated or significant training materials being retained permanently and can ensure those are added to an employee's file (stored separately at the moment). Thanks!	No	Travis Rosenberg		435-652-7 521		travis.rosenberg@diexie.edu
I agree with the proposed changes	No	Lindsay		43574353 02		lmitchell@co.millard.ut.us
This has minimal impact to UDOT, no objections	No	Clint LeSueur		80159269 22		clesueur@utah.gov

The health record says retention is for seven years, but originally said seven years from separation. Is that an error or is it seven years from receipt? I have no other comments.

Lisa